



Ricardo
Energy & Environment



One-to-one Farm Advisory Service

2021/22 Business Plan for Scottish Government

Customer:**Scottish Government****Customer reference:**

Farm Advisory Service

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Executive summary

Aims of the Service

The agricultural sector is facing some of the most significant change it has seen in the last 80 years, with likely changes to international trading relationships, markets and increasing environmental concerns and public demands, coupled with a revision in subsidy support. This all means that the demands on an advisory service will change.

Ricardo have developed this business plan to ensure a continuity of the high quality support currently available to farmers, land managers and crofters. The plan builds on our experience from the last 4 years of delivering the one-to-one service to ensure we continue to strengthen delivery and provide additional capacity in key areas. Lessons learnt, that are addressed in resourcing this plan include:

- The need for businesses to have a personal advocate to help drive and steer them through making changes to the business. A good adviser will often do this for them, but we see many businesses who stall and would benefit from more frequent personal interaction with the programme to help ensure that reports do not lay dormant and taking the next step is made easy. We propose to provide this support. Ricardo will contact businesses 3 months following report delivery to discuss how the business is getting on and what further support we can provide to help them move forward. This will involve talking through the action plan and assessing what next, it could be a case of simply signposting businesses to relevant FAS events or sending them relevant publications, or it may flag a need for further specialist advice.
- The need to deliver stakeholder engagement and communications activities which were not part of the original FAS tender, but have been proved to be instrumental in ensuring the FAS delivery is well established and integrated in wider agricultural support in Scotland
- The peer review of Integrated Land Management Plans by experience industry experts has been key to raising the quality of delivery. The programme to date has provided capacity for 100 reports to be peer reviewed. In recognition of the value of this activity, Ricardo propose to provide capacity to double this output in 2021.
- With the changes to FAS delivery and to the demands of farmers it is going to be more vital than ever that the FAS support is prominent in farmers' minds, to achieve this FAS will provide additional resource into the communications campaign.

This plan has been developed with an appreciation of the evolving ask of the service and advisers working on our behalf. The Climate Change Plan and farmer-led groups, such as the Suckler Beef Climate Group and newly formed Arable Sector Climate Group will define a new need for farmer support.

This business plan will:

- Provide flexibility and adaptability to ensure the support model continues to evolve to meet government and industry needs.
- Build capacity for Ricardo to deliver enhanced adviser training to ensure advisers have the knowledge and confidence to deliver advice on new topics and in new areas.

Through the delivery of this business plan the FAS will build on its strengths and pilot new services to ensure we deliver support that is of a high quality and relevant to the sector now and in the future.

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1 Introduction

The Farm Advisory Service Scotland is designed to help support the sector to achieve sustainable growth and is key to achieving the goals of Scotland’s Climate Change Plan.

The service is delivered through two contracts, the One-to-Many contract managed by SAC Consulting and the One-to-One contract managed by Ricardo Energy and Environment. The delivery of the two is integrated by the hub, with a shared advice line and website, so customers engaging with the programme should not perceive any split and be seamlessly directed to the most relevant service to meet their needs.

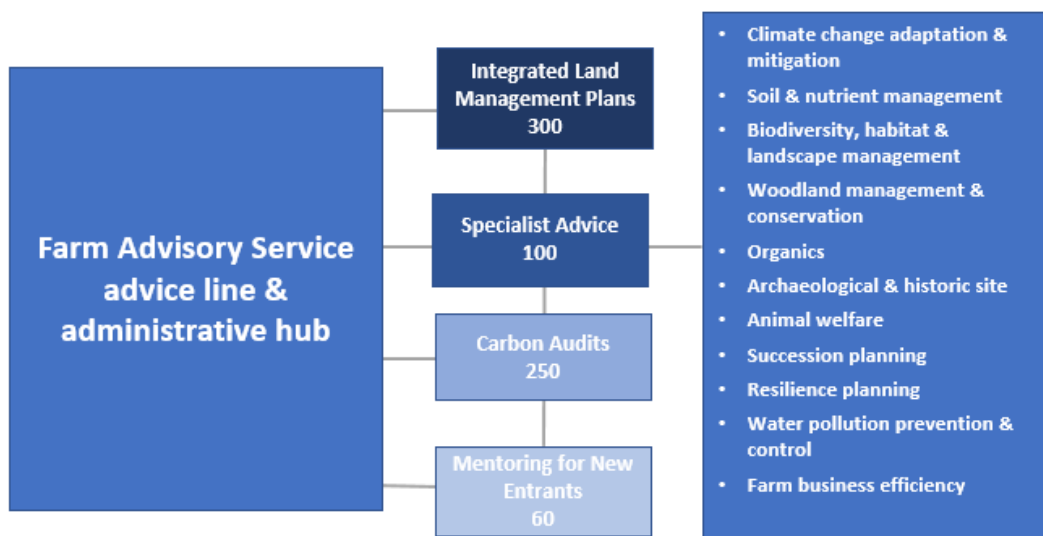
This business plan presents plans for delivery of a 12 month extension of the original the Farm Advisory Service (2016-2020), the plan covers the period from 1st January 2021 to 31st December 2021

1.1 FAS One-to-One Delivery

The One-to-One contract aims to ensure crofters, farmers and land managers have access to one-to-one consultancy support. These one-to-one visits will provide significant value to farmers/crofters as the advice is specific to their enterprise, locality and issues. The advisor will bring detailed local and enterprise knowledge and a fresh perspective. Through discussion with the farmer, the adviser can assess the ‘vision’ for the farm or croft, develop objectives and determine why certain management practices are followed and what options would be most suitable. The adviser is then able to talk these recommendations through with the farmer/crofter to establish an action plan. The service comprises four elements:

- Integrated Land Management Plans (ILMP) – government funding of up to £1,200 per plan
- Specialist advice - Up to £1,000 for public good advice and £800 for business efficiency advice
- Carbon audits -funding of £500 for a first audit & £250 for an annual review
- Mentoring for new entrants to farming - Up to 4 days one-to-one with a personal mentor

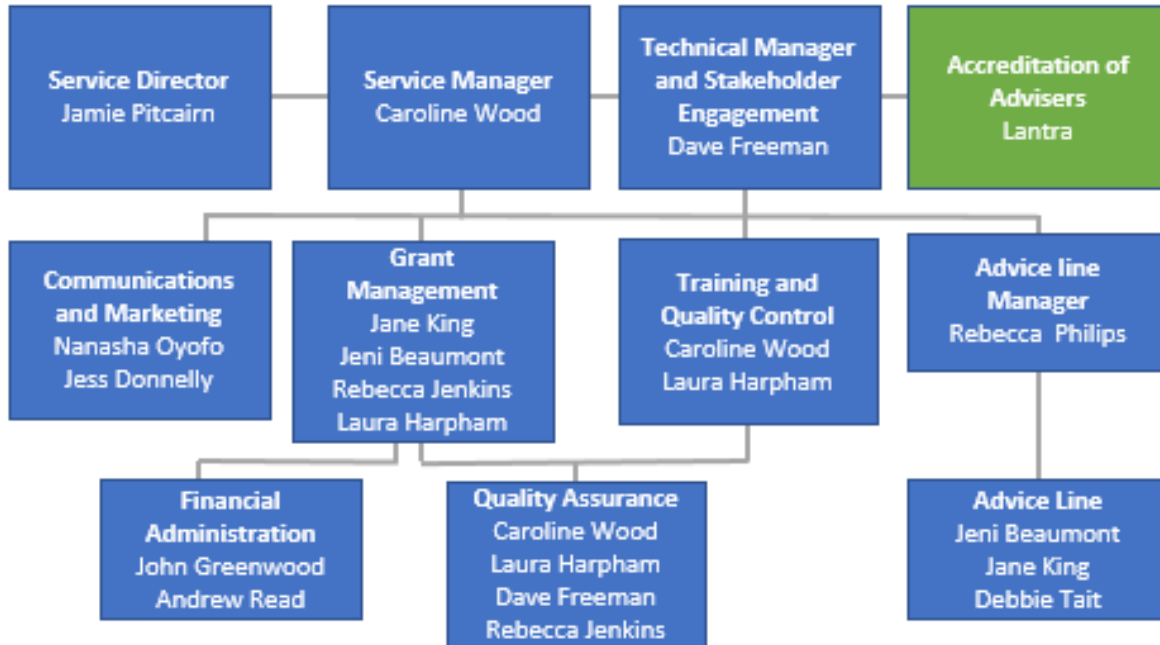
Figure 1 Diagram to show the components of One-to-one advice



2 Contract Management

2.1 Team Structure

Figure 2 Team Structure



Our governance structure will ensure:

- **The Service Manager**, Caroline Wood, as the single point of accountability for all work delivered under the contract and the first point of contact for all communications with the Scottish Government
- **Technical Manager**, Dave Freeman as second point of contact for the Scottish Government and an advisor available to support Caroline should the need arise
- **The Service Director**, Jamie Pitcairn, our Scottish Office Director, as a senior contact should there be a need for escalation within Ricardo

The governance structure provides:

- An experienced team who follow documented internal processes to ensure effective management and a consistently high quality delivery to customers
- Effective stakeholder engagement and integration with work delivered by the one-to-many programme.

Key changes in 2021

Piloting a client management approach- Ricardo propose to bring a new member of staff into the team -Laura Harpham. Laura joins us in January as a very competent agricultural stakeholder and programme manager, having previously managed Championing the Farmed Environment (CFE) in England. We propose to engage Laura in piloting a new approach to the service delivery. Our experience is that businesses often need a personal advocate to help drive and steer them through making changes to the business. A good adviser will often do this for them, but we see many businesses who stall and would benefit from more frequent personal interaction with the programme to help ensure that reports do not lay dormant and taking the next step is made easy. We propose that Laura will focus on providing this support. Laura will contact businesses 3 months following report delivery to discuss how the business is getting on and what further support we can provide to help them move forward. This will involve talking through the action plan and assessing what next, it could be a case of simply signposting businesses to relevant FAS events or sending them relevant publications, or it may be a case of following up with specialist advice.

Ricardo have also sought to boost the teams' marketing and communications delivery by providing more time for Nanasha Oyoyo and bringing in Jess Donnelly as marketing support. With the changes

to FAS delivery and to the demands of farmers it is going to be vital that we are able to provide a well-resourced communications campaign to ensure the role of FAS and the support it can provide is prominent and service can offer the valuable support the sector will require in the coming year.

3 Quick glance table of deliverables

Table 1 below summarises the various meetings and the other deliverables, the following sections of this plan clarify the purpose and responsibilities for each deliverable.

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	Steering Group meetings (x4)	5
	Stakeholder Group meetings (x4)	5
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ADVISER PAYMENTS		
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MONITORING & EVALUATION		
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4 Reporting and Communications

The Service Manager is the lead point of contact for the Service. The formal communication routes are:

- **Progress report** by phone call as required.
- **Short monthly reports** sent electronically to the Scottish Government's contract manager within 14 days of the month end will be compiled by the service manager to detail the milestones achieved, metrics of delivery to date, plans for the next month, highlights and issues. Any issues will be updated on the shared FAS actions and issues log.

In addition to the monthly report Ricardo will provide:

- a schedule of time bookings and direct costs,
 - a completed EU reporting spreadsheet.
 - Details of all ILMPs approved during the month
- **Annual report** Sent electronically to the Scottish Government's contract manager within 31 days of the end of the calendar year and compiled by the service manager, with material provided by the stakeholder manager, quality and advice manager & communications manager. The report will summarise the types, topics and advice activities conducted over the year, number of participants nationally and regionally, collate feedback from the year and consider any trends. The report will review issues raised and resolved through the year and lessons learnt and their implications on plans for the year ahead will be considered

4.1 Management Meetings

- **Bimonthly Meetings.** Ricardo will attend bimonthly management meetings held via Teams and attended by the Service Manager and Service or Technical Director. The meetings will jointly review the delivery and performance, delivery against plans, scheme uptake, feedback and outcomes achieved. The management group will discuss any issues and agree remedial actions. Actions and issues will be updated on the FAS actions and issues log
- **Steering Group Meetings.** When required Ricardo will provide service related input at these meetings. The meetings will be held either via Teams or in Scottish Government offices, attended by Service Manager and Service Director or Technical Director.
- **Stakeholder Group Meetings.** Ricardo will take the lead in delivering 4 quarterly stakeholder group meetings during the 12 month period. The meeting is an opportunity to promote understanding of what FAS can offer and to identify means by which stakeholders and FAS can work together to mutually support farmers. Organisations currently included are AHDB, QMS, Soil Association, Women in Agriculture, RSABI, CAAV/SAAVA, Lantra, AIC, NFUS, Scottish Beef Association, Scottish Land and Estates, Scottish Crofting Federation, SAOS, National Sheep Association, Agricultural Champions, RSPB, Dairy Hub, Scottish Tenant Farmers Association, Scottish Association of Young Farmers Clubs, Forestry and Land Scotland, Land Commission. This group can and will be extended if there are others who have an interest in attending.

We understand that industry and government priorities will change over the lifetime of the project, the purpose of the communication activities detailed above is to ensure that there is ongoing dialogue so Scottish Government and Ricardo can agree and plan any changes to delivery that will be required.

5 Working with Advisers

5.1 Accreditation of Advisers

Ricardo will continue to work closely with Lantra who will manage the FBAASS accreditation of advisers. It will remain a requirement of advisers delivering Integrated Land Management Plans and Carbon Audits to be FBAASS accredited.

Lantra work independently to manage this accreditation process and reaccredit advisers on an annual basis. In reaccrediting Lantra will take into account evidence of ILMP reports that they have reviewed during the previous delivery year. If an adviser is new to the programme or has not delivered an ILMP within the year then they will be required to provide further examples of their work for resubmission.

In addition to evidence of work, Lantra also stipulate that each adviser must demonstrate continued learning and gain 20 CPD points during the year.

Lantra are tasked with ensuring the advisor panel is sufficiently robust with approximately 90 advisers and an appropriate ratio of advisers from SAC to other organisations. Lantra actively promote FBAASS accreditation to advisers and specifically target advisers who have a reputation for delivering high quality services. Word of mouth/adviser recommendation is an important marketing tool for the programme, it is important that we do not disadvantage farmers in certain geographies simply by having insufficient advisers in the region. Should reviews identify a need to recruit more advisers Ricardo and Lantra will work to fill the gap.

5.2 Adviser Training

The FAS has a key role in providing training to enhance the knowledge of advisers in Scotland to deliver advice that meets the needs of current and potentially future agricultural challenges and government policy/targets. Our training workshops are well-regarded and seen as relevant to the work the advisers undertake in Scotland, as evidenced by the high attendance (average of 70 per session) and positive feedback in 2020.

Ricardo have enabled advisers not currently delivering the FAS to attend this training as it is an opportunity to draw new advisers into the delivery team ensuring capacity to deliver is expanded.

Ricardo will continue to work with the advisers and stakeholders to understand where we can add value and deliver training to meet the advisory needs of Scottish agriculture in these changing times.

Following the excellent response to the on-line training delivered in 2020, through which training was delivered at 1.5hr sessions over Microsoft Teams, Ricardo will continue to utilise this delivery model in 2021. The length of the sessions and the time saved in travel were popular as advisers could fit the training in with other commitments.

5.2.1 Training delivery

The use of on-line training enables Ricardo to be significantly more flexible in allowing the training agenda to develop as needs crystallise. This will be important in this year of flux, when we anticipate that the Climate Change Plan and sector led approaches will be significant influences on steering the shape of the programme.

Current topics of training Ricardo propose to deliver in quarter 1 of 2021 are:

- Carbon trading for farmers
- Brexit: exploring the impacts of the trade deal
- A natural capital approach.

Ricardo will continue to seek feedback on where training is required, this will include looking to:

- a) Feedback from advisers on where they feel they need further information

- b) Feedback from the peer review of reports
- c) Feedback from Scottish Government, the Steering Group and stakeholders on areas in which they require advisers to be better informed.

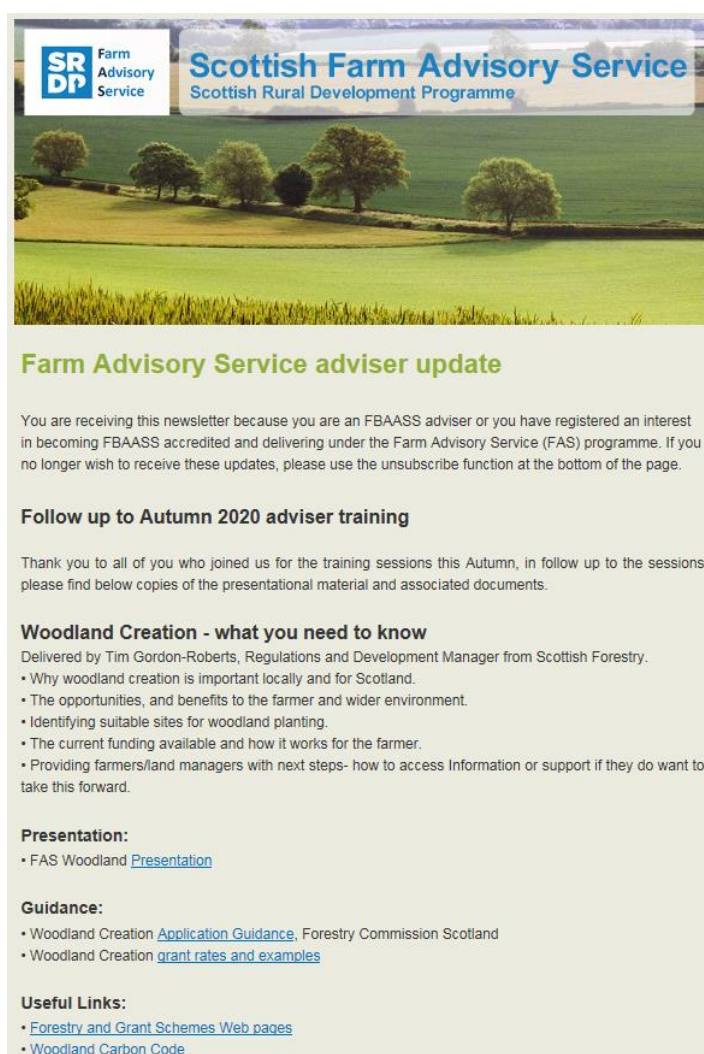
5.3 Adviser Communications

Ricardo will continue to deliver the e-newsletter for FBAASS advisers and associates (116 at present). This newsletter for advisers will continue to be issued electronically on a bimonthly basis utilising a system called Dotmailer.

The intention of the newsletter is to build a sense of team and common purpose and to keep delivery of the scheme at the forefront of advisers' minds.

The newsletter provides advisers with updates on delivery through the scheme, feedback and news, and information on any changes in policy or guidance of which advisers should be aware.

Figure 3: Image of sample newsletter



Stakeholders and policy leads are encouraged to use this newsletter as a communications channel if there is information that needs to be shared with the advisory community.

6 Promoting the service to farmers and land managers

Ricardo will continue to explore the range of mediums including social media to generate awareness of the service. The marketing and communications will inform the fulfilment of the following objectives:

- Raising awareness of the advice available and publicising the routes to access the service.
- As a direct call to action, publicising through direct mail where appropriate or through stakeholder groups.

Communications will focus on increasing uptake. This will be achieved by meeting the farmer/crofter's demands and increasing their economic (cost saving or compliance) and environmental return. This in turn will be made possible through efficient targeting techniques. We will work closely with the one-to-many service to identify opportunities to promote the one-to-one service utilising all channels possible including newsletters, event feedback forms and wider joint promotional activity.

In promoting the service, Ricardo will seek to work with key stakeholder groups.

6.1 Website

The hosting and development of the website sits within the one-to-many contract. Ricardo will develop the content for the one-to-one contract but are not able to control, the visualisation of this content or the functionality of the website.

Ricardo will continue to work closely with Will Searle (SAC) to provide new web content and ensure that the web content is kept fresh and up to date.

6.2 Case studies

Case studies are highly effective in demonstrating the value of the service to farmers as readers identify that the support was beneficial to a business like their own.

Ricardo will identify businesses which would provide a good focus for a case study. Typically, businesses which are particularly high profile or those who have achieved significant benefits through their engagement with the one-to-one service.

Figure 4: Example FAS Case study

ILMP helps beef farmer identify ways to reduce costs & improve profitability

Find out how an Integrated Land Management Plan (ILMP) has helped farmer, Danny Miller, set a path towards reducing costs, improving the profitability of his business and achieving a better work/life balance. When asked about his advice to others interested in seeking help with an ILMP, Danny commented: *'I would say – frankly, you'd be an idiot not to because there is a source of funding available to help you make your business better.'*

[Watch video for full details](#)

Curious to find out how an ILMP can help your business? Contact advice@fas.scot, call 0300 323 0161 or visit www.fas.scot to find out how FAS can help.



Ricardo will seek to promote:

- case studies of farmers who have used the service to adapt their business to deal with future pressures/market change.
- case studies of women in agriculture; in particular, aiming to deliver a video case study of a female mentor explaining and promoting the mentoring service.
- monitor farms who have utilised the service.
- carbon auditing; how to use the results to benefit the business.
- the use of the resilience specialist advice.
- the use of the service by crofters and small farms.
- case studies of farms incorporating environmental management.

In identifying case studies, we will look for a range of experienced farmers and new entrants to try to provide cross section that represents the sector.

6.2.1 Format and content

Covid 19 has created a real step change in farmers and land managers confidence and willingness to engage with digital content. Social media and the website is now the key component of the FAS communications and engagement with FAS on-line content has peaked in 2020. To appeal to on-line audiences FAS must deliver first class video and podcast content.

Ricardo's preference is to deliver video case studies, however in order to continue to deliver within Covid 19 restrictions we have shifted the focus in 2020 to audio recordings and podcast delivery as this does not require face-to-face contact. In 2021 we will retain flexibility and continue to review what is possible within the covid guidelines and will also assess how the one-to-one content best feeds into the new FAS TV initiative proposed by SAC.

Video case studies involve Ricardo working with the business to agree the format and script, a professional film maker then films on site and the video is then edited. The final proof is approved by the business prior to circulation.

Written case studies are drafted by Ricardo's in-house copy writer and reviewed by a professional copy editor. Prior to any publication the business will review the material and only with their authorisation will the case study be published.

An article is normally drafted around each case study and this is circulated to publications and stakeholders to help ensure coverage in publications.

Case studies will be made available on the FAS website and circulated to stakeholders for potential inclusion on their own communications.

6.3 Press releases and feature articles

The Ricardo Public Relations team will work with agricultural and national press to promote the inclusion of our press articles. We will provide articles to publications such as: Farmers Weekly (ABC Audited Circulation 59,328); Scottish Farmer (ABC Audited Circulation 16,633), Farmers Guardian (ABC Audited Circulation 38,501). Press releases will also be set to a circulation list of wider industry weekly and monthly publications.

In addition to press releases, Ricardo will draft a feature article to launch each case study (detailed above), articles will be shared electronically with the stakeholder list and online via website. Where required articles will then be tailored to meet the specific needs of each publication.

6.4 Quarterly stakeholder pack

The e-tool kit was first launched in November 2017 and has proved to be a popular and effective way of ensuring that other individuals and organisations who engage with farmers, landowners and crofters in Scotland are well briefed on the services available through the FAS. The pack is currently received by 225 individuals on a quarterly basis. The pack provides a timely update on FAS activities and links

to articles, photos and social media content all in a format to enable stakeholders to pick up and include the content in their own communications.

Figure 5: Example of stakeholder pack

Farming business support in challenging times

Welcome to the November 2020 edition of the Farm Advisory Service (FAS) stakeholder pack.

2. Text for your newsletter: (FAS programme information)

Apply for an ILMP to identify growth opportunities and cost savings for your farming business

Through the [Farm Advisory Service \(FAS\)](#), Scottish farmers and crofters can access Government grant support to secure the help of an accredited farm business adviser to develop a professional Integrated Land Management Plan (ILMP) for their farm or croft.

As part of developing an ILMP, the adviser will carry out a thorough and confidential review of the business – assessing business strengths, weakness and threats as they relate to the business owner’s vision for the future or land manager’s long-term plans. The review process will encompass the full spectrum of business sustainability – assessing natural resources, physical assets and financial records – with the aim of identifying opportunities to make cost savings. The adviser will work with a participating business to explore the potential to develop competitive advantage or technical excellence in areas where the business is strong or has growth potential.

The ILMP assessment is flexible and may also include:

- a basic habitats, biodiversity and conservation assessment;
- a financial performance analysis;
- a cross compliance assessment to highlight where there may be risk areas for the business.

Assessments can be carried out remotely, face-to-face contact is not essential.

There is a lot that can be achieved by speaking to our experts by phone and/or video calling. Background data can be supplied via email or post; and land information can be collected remotely using mapping software and video calling or can be arranged so there is no social contact.

To apply or for more information about FAS services, explore our website. Alternatively, call 0300 323 0161 or email advice@fas.scot.

270 words

For example see: http://i.emlfiles4.com/cmpdoc/2/1/2/7/1/files/476007_fas-2017---stakeholder-pack_new-entrants.pdf?utm_source=Ricardo-AEA%20Ltd&utm_medium=email&utm_campaign=8942099_SFAS%2FNAO-BB%2FED61746005%2FStakeholder%20email&dm_t=0,0,0,0,0

6.5 Social media

Ricardo currently do not have direct access to the FAS social media accounts but must work through SAC. We are exploring with SAC whether we could adopt a shared platform which would enable Ricardo to have more control of the one-to-one content delivery. Ricardo will continue to schedule regular monthly Twitter and Facebook posts directing traffic back to advice and grants page on FAS website. (Monthly). Posts will be themed around topical issues utilising images, videos and promotional material to encourage likes and sharing.

6.6 Attendance at shows, meetings and events

Whilst 2020 has not allowed the usual attendance at conferences, meetings and shows, the switch to digital has offered new and different opportunities, for example the ability to deliver virtual lunchtime training to RPID staff. Ricardo will continue to explore opportunities to provide speakers or representatives at shows and conferences both online and in person. It is anticipated that we will attend 12 such events during the year but will provide flexibility to attend more if there are good opportunities and if this activity is demonstrated to have good impact and provide value for money.

6.6.1 Attending One to Many Meetings

Ricardo will liaise with SAC to identify where there is value in having a one-to-one speaker at events. To ensure value for money we would look to target events with over 40 attendees.

6.7 Focusing communications

There are key organisations we have identified as having an important role in providing information to farmers and with whom FAS will engage to ensure that farmers have good opportunities to hear about the FAS support. Key groups that FAS will seek to work with in this delivery year are:

- The National Parks- to ensure that the parks recognise the value of the Integrated Land Management Plans and that FAS services are promoted to tenant farmers.
- The Crown Estate- as above has an interest in ensuring that land is sustainably managed
- RPID offices- these are often one of the first interactions a new entrant to farming will have, through this conduit we have a great opportunity to promote the support available
- Banks and financial institutions- organisations lending to the agricultural industry have an inherent interest in ensuring the sustainability of the businesses in which they invest.
- Supply chain groups – FAS will engage businesses within the agricultural supply chain to identify opportunities for promoting the FAS service to members/clients.

7 Providing Added Value

7.1 Client management approach

The need for businesses to have a personal advocate to help drive and steer them through making changes to the business. A good adviser will often do this for them, but we see many businesses who stall and would benefit from more frequent personal interaction with the programme to help ensure that reports do not lay dormant and taking the next step is made easy. We propose to provide this support. Ricardo will contact businesses 3 months following report delivery to discuss how the business is getting on and what further support we can provide to help them move forward. This will involve talking through the action plan and assessing what next, it could be a case of simply signposting businesses to relevant FAS events or sending them relevant publications, or it may flag a need for further specialist advice.

7.2 Stakeholder Engagement

Ricardo will continue to place significant focus on stakeholder engagement and communications activities which were not part of the original FAS tender but have been proved to be instrumental in ensuring the FAS delivery is well established and integrated in wider agricultural support in Scotland. This includes convening and hosting stakeholder meetings, providing speakers to stakeholder events and sharing content via the stakeholder pack.

7.3 Expanding the expert peer review of reports

The peer review of Integrated Land Management Plans by experience industry experts has been key to raising the quality of delivery. The programme to date has provided capacity for 100 reports to be

peer reviewed. In recognition of the value of this activity, Ricardo propose to provide capacity to double this output in 2021.

7.4 Expanding the communications reach

With the changes to FAS delivery and to the demands of farmers it is going to be more vital than ever that the FAS support is prominent in farmers' minds, to achieve this FAS will provide additional resource into the communications campaign.

7.5 Providing flexibility

Ricardo will continue to seek feedback from service users, advisers delivering the service, stakeholders and Scottish government to identify how the service could better serve the needs of the sector. Ricardo will be creative and proactive in identifying how the service could flex and evolve to meet these needs. This might be through developing new one-to-one services, removing barriers to uptake or providing more training to advisers. We are committed to ensuring the service provides the best value to our clients.

8 Managing service data

Ricardo track all interaction with service users of both the helpline and grants schemes via a centralised CRM (Customer Relationship Management) database which was developed specifically for the purposes of this project. This enables Ricardo to provide rapid reporting to Scottish Government on all aspects of service delivery.

Ricardo will continue to maintain this database:

- To track customer information so we can clearly understand who has engaged, how they have accessed the service and what support they have received (Advice Line, visit, etc)
- To manage the progression of each scheme. The management process and the CRM database will be designed to ensure that each check is complete before payment may move on to the next step.
- For each scheme there are specific checks that must be completed at each stage of the process. For example:
 - On receipt of the application we will check the eligibility of the farmer/crofter to receive the funds. That they have a BRN number and that they do not receive in excess of: 1 ILMP, 2 Specialist Advice visits, 4 days of mentoring in total; or 1 Carbon Audit per year
 - Check that the proposed funding of an ILMP is not in excess of £1,200 or more than 80% of the overall cost of the advice.
- Check that we have received a signed acceptance of the offer before the visit goes ahead.
- We will use our database to forecast claim data. Our portal has been specifically designed to meet the detailed data requirements. We will build in reports to identify data that is incomplete
- All technical queries will be responded to by the helpdesk and will be recorded in the database for reporting and quality assurance purposes

9 Management processes for scheme delivery

Regardless of farm size or business stage, through FAS, new and experienced farmers can access a range of expert consultancy and specialist advice to help them achieve their business aspirations.

One-to-one support services and funding available:

- Integrated Land Management Plans (ILMP) - Up to £1,200 per plan
- Specialist advice - Up to £1,000 funding for public good advice and £800 for business efficiency advice
- Carbon audits - Up to £500 per audit, available per annum
- Mentoring for new entrants to farming - Up to 4 days one-to-one with a personal mentor

Figure 6 Diagram to show the potential offering to a typical business



ILMP	£1,200
Specialist advice x 1	£1,000
Specialist Advice x 2	£1,000
Carbon audit	£500
FAS Funding =	£3,600

10 Integrated Land Management Plans

The Scottish Government, through the Farm Advisory Service (FAS), offers funding to help Scottish farmers and crofters access expert consultancy support to develop a professional, Integrated Land Management Plan tailored for their farm or croft.

Why is an ILMP important?

- Provides professional advice to support decision making.
- Reviews the business to make sure it is in the best shape to deal with future uncertainty.
- Provides a clear route map to take the business to the next level.

The purpose of ILMP is to provide a holistic review, incorporating environmental, financial and other public good components into the business advice provided. The ILMP is an integrated plan that is specifically tailored to meet the wide-ranging requirements of the individual farm business or crofts.

The ILMP is structured to ensure that each plan fully integrates all the components of sustainability and provides a balance in focus between **environmental** and **economic** performance and delivering **public good** benefits. But is flexible to cater for the diversity of farms and crofts, the challenges they face and the variance in business size and complexity.

The aim is that the structure of the ILMP provides the template and prompts to ensure advisers are triggered to include all relevant information, there are core elements that should be consistent across all plans, but to avoid being overly prescriptive. Accredited advisors will review the enterprise and consult with the farmer/crofter to develop ILMP's which focus on areas of greatest relevance to the individual business.

The core components of the ILMP are:

- Vision statement for the farm business or croft
- Objectives of the plan
- Summary of actions
- Farm Map
 - Identification of natural assets and environmental features (including soil mapping)
 - Woodland area
- Business and natural resource review
 - Business structure
 - Enterprise information
 - Soil and nutrient management review
 - Biodiversity and conservation review
 - Financial statement
 - Enterprise analysis (GM)
 - Technical performance of enterprises (This could include, health and welfare, crop health and management etc)
 - Cross Compliance and Greening
- SWOT analysis and options appraisal
- Conclusions, actions and implementation plan

Figure 7: Graphic to show the components of an ILMP



ILMPs are delivered by advisors accredited to the Farm Business Adviser Accreditation Scheme Scotland.

Grant assistance towards 80% cost of the ILMP (to a maximum of £1,200) is paid by the Farm Advisory Service direct to the adviser's company on evidence that the work has been completed.

The programme will deliver up to 300 ILMPs per annum, each plan will require on average 2 days of advice. At a cost of £1,200 per advice/plan, budget of £360k per year.

The ILMP will signpost opportunities for the farmers/crofters to gain more in-depth advice via the Specialist Advice.

11 Specialist Advice

Specialist advice supports the business to take a deeper look at specific issues of concern or interest.

In addition to an ILMP, a business can benefit from two further specialist advice plans, covering:

- | | |
|--|--|
| • climate change adaptation and mitigation | • farm business efficiency |
| • soil and nutrient management | • organics |
| • biodiversity, habitat and landscape management | • woodland management and conservation |
| • water pollution, prevention and control | • animal welfare |
| • archaeological and historic site advice | • succession planning |
| • resilience planning | |

While an Integrated Land Management Plan must be completed by an adviser accredited under the Farm Business Adviser Accreditation Scheme for Scotland (FBAASS), there is more flexibility when selecting the adviser to deliver specialist advice.

A requirement of the scheme is that the specialist adviser is appropriately qualified to deliver this advice. This is defined as the adviser having relevant academic or professional qualifications (for example, membership of relevant chartered association) and at least 4 years of experience delivering advice in this area. To provide evidence of this, a copy of the chosen adviser's curriculum vitae (CV) or a record of appropriate experience gained while working with farmers in the specialist area (including professional accreditation) must be sent to the Farm Advisory Service for approval

Grant assistance towards the cost of the specialist advice is paid by the Farm Advisory Service direct to the adviser's company on evidence that the work has been completed.

11.1 Specialist Advice Grant Rates

The table below details the topics and funding available:

Topic of advice	Funding available	% of overall costs that may be covered*
Resilience Planning	Up to £1000*	100%
Climate change adaptation and mitigation	Up to £1,000	100%
Soil and nutrient management	Up to £1,000	100%
Biodiversity, habitat and landscape management	Up to £1,000	100%
Woodland management and conservation	Up to £1,000	100%
Water pollution prevention and control	Up to £1,000	100%
Organics	Up to £1,000	100%
Archaeological and historic site advice	Up to £1,000	100%
Animal Welfare	Up to £1,000	100%
Farm business efficiency	Up to £800	80%
Succession Planning	Up to £800	80%

Excluding VAT, except for businesses that are not registered for VAT and will not reclaim the VAT from HM Customs & Excise, in which case the grant will be based on the total cost including VAT.

**There is no requirement for an ILMP prior to undertaking a resilience plan. It will however count within the budget of support available to that business and is not additional to the allocation of 1 ILMP, 2 Specialist Advice Reports.*

11.2 Access to Specialist Advice

The original scheme design required specialist advice to only be accessible to businesses that had previously completed an ILMP (or in conjunction with an ILMP). Experience has shown that this can be a barrier to businesses taking up the advice. In order to stimulate demand in areas of critical importance to delivering government priorities the requirement for an ILMP has been removed from:

- Resilience planning
- Woodland management and conservation
- Succession planning, and
- RSABI referred hardship support

11.3 RSABI Hardship Process

It has been identified that in a few cases specialist Hardship support from FAS would help provide support quickly and allow access to Scottish Government funding for the most vulnerable in the sector.

To provide timely and appropriate support to farmers in this situation it has been agreed that farmers identified by RSABI as requiring hardship support may receive specialist advice on business efficiency or animal welfare without the requirement to have previously undertaken an Integrated Land Management Plan. This support is 100% funded at £1,200, the applicant is required to cover the VAT.

11.3.1 Eligibility:

As well as requiring the farmer or crofter to have a BRN number, an assessment from RSABI is required to confirm hardship. RSABI, conduct a visit and complete an internal application form to refer the farmers to FAS. The completed form is submitted via the normal route to advice@fas.scot however RSABI will also alert the Project Manager, Caroline Wood on Mobile: 07968707248 | Tel: 01235 753310| E-mail: CarolineE.wood@ricardo.com who will ensure the application is dealt with as a first priority and will keep RSABI informed on progress.

The applicant is, as with the current scheme, able to choose their own FBAASS accredited adviser to deliver the specialist support, however if time is an urgency, Ricardo can intervene and put a call out to all FBAASS advisers to identify which advisers have availability and can deliver within a set timeframe (as indicated by RSABI).

11.3.2 Additional grant assistance:

The applicant is still be eligible for the full grant assistance that is available as per the current scheme guidelines, this includes the ILMP which has been by-passed on this occasion.

11.4 Process for administering ILMPs



11.5 Process for administering specialist advice



11.6 Updating guidance, templates and web content

Ricardo will continue to review and update the scheme guidance, application forms and web content to ensure they are current and fit for purpose.

Should there be any substantial changes to scheme criteria or delivery advisers will be notified by email and postal letter.

12 Carbon Audits

Carbon Audits are undertaken using the Agricultural Resource Efficiency Calculator (AgRE Calc).

All FBAASS advisers have received training on how to use the Carbon Calculator and guidance and templates for the delivery of the report and for advisers new to the process there is extensive training available on the adviser training portal <http://sfas.ricardo-aea.com/>

Up to 250 carbon audits will be delivered this year. The carbon audits provide value to both the beneficiary and Scottish Government. The beneficiary will benefit from a resource efficiency audit that will lead to economic savings and environmental benefits at a farm level. It will also provide an evidence base for Scottish Government, providing quantified GHG emissions reduction potential for farms that can inform how future policy can be shaped to meet GHG reductions commitment.

In addition to this general awareness, farmers/crofters need specific advice on the steps they can take to reduce their GHG emissions, to improve the efficiency of their resource use, to help lock carbon into the soil, grow trees to sequester carbon from the atmosphere, to maintain peatlands and to use their land for development of renewable sources of energy. Many produce buyers and retailers are asking farmers and growers to demonstrate their green credentials. Therefore, there are clear economic, environmental and reputational advantages for farmers and crofters to monitoring and reducing carbon footprint. One way of achieving this is through a carbon audit.

12.1 Process for administering carbon audits



13 Mentoring for new entrants

The average age of farmers is increasing, and insufficient opportunities exist to attract the numbers of new entrant farmers that the industry needs. This is a problem across Europe. It is a clear priority for SG to support generational renewal in agriculture in Scotland. Scottish farming needs to attract a steady flow of new entrant young farmers with drive, innovation and entrepreneurial skills.

In September 2012 the Scottish Government set up a New Entrants Advisory Panel. The Panel advises Government on the future role of support for new entrants. There has been active engagement with the Panel to explore what further or different articles could be introduced in the SRDP to remove barriers to entry and /or incentivise new entrant young farmers into the industry. a range of interventions were suggested by Panel one of which was mentoring.

It is widely recognised that all professionals, wherever they are in their career, can benefit from having a mentor. However, there are more significant benefits for new entrants to receive mentoring support during their first few years after qualification, having taken on land or a tenancy or when receiving grant support. Therefore, another advisory component for FAS one-to-one advice programme will be mentoring for new entrants.

Mentoring support helps new entrants establish profitable and sustainable businesses. New entrants benefit from being paired with an experienced farmer in their sector, who can provide tailored support and advice on how to manage set up and grow the new farm or business. Typical skills that mentors offer include experience of running a farm business, traditional skills (e.g. stone walling and hedge laying), and food and drink industry experience.

The programme will seek to support 60 mentees per year.

13.1 Process for recruitment of mentors

Mentors are recruited through stakeholders and the recommendations of our adviser network who between them have contact with a substantial proportion of the farmers, crofters and land managers in Scotland and an excellent knowledge of who the leading farmers are. It these personal contacts that are most potent in encouraging an experienced farmer to get involved and share his/her knowledge.

We also work in collaboration with Lantra who bring the experience of delivering the 'Get Mentoring' service and mentors working with the Get Mentoring service. There is not a single approach to recruiting mentors, the recruitment will usually involve personal engagement and introduction.

Ricardo ask interested mentors to complete a data collection form which collects information on the mentor to enable us to create a profile and to match their skills with mentees.

Mentors come from a wide variety of backgrounds and experiences but appropriate attributes include.

- A sound knowledge /experience of agriculture at a grass root level.
- A master of traditional skills eg stone walling, hedge laying etc.
- Land based educational/skills background.
- Food and drink industry.
- Finance/business planning.
- Surveying/planning.
- Knowledge of conservation and biodiversity
- Forestry or woodland skills

Mentors are paid an honorarium of £250 per day. No mentor is able to exceed more than £2K per annum (i.e. a maximum of 2 mentees.).

13.2 Process for recruitment of mentees

Ricardo will continue to work closely with the New Entrants to Farming Programme and Scottish Government's FONE group to ensure all new entrants who engage with this group or receive support via the Government are informed of the mentoring service.

The mentoring support will also be promoted through communications with stakeholders, the development of case studies promoting the value of the service and the circulation of these case studies and promotional articles with agricultural press and stakeholders.

13.3 Review of mentor guidance

Ricardo will continue to respond to feedback and will update mentoring guidance, application forms and promotional material as required throughout the year to ensure the benefits of the scheme are well communicated and the application process is clear and easy.

13.4 Process for administering mentoring



14 Quality Assurance

In order to ensure quality of service, a number of key performance indicators relating to service will be monitored and reported on.

Analysis of the feedback provided by farmers to date testifies that the quality assurance process is working and the support is high quality and well received:

14.1 Key Performance Indicators (KPIs)

Quality of advice

- Quality of advice: at least 85%, of feedback by advice recipients is classed as good or better (assessed from answers to relevant questions in feedback form (Land Manager Evaluation Form)).
- Relevance of advice: over 85% of advice recipients thought the advice given was relevant to their business (assessed from answers to relevant questions in the feedback form).
- Impact of advice: over 70% of advice recipients state they will use the advice provided to change their management practices (assessed from answers to relevant questions in the feedback form).
- Behavioural change: over 70% of recipients of advice stated that they have taken action as a result of the advice provided (assessed at ILMP review visit and potentially via SG evaluation survey).

Advice Line:

- Response time for routine queries - 90% within 1 working day.
- Response time for detailed queries (those requiring specialist input) - 90% within 2 working days.
- Response time for complex queries - 100% within 5 working days.
- Quality of advice: over 70% of advice recipients state that the service they received was excellent or good (assessed did this help question asked at the close of each call and potentially via SG evaluation survey).

14.2 Scope and responsibility

The Ricardo service manager is responsible for ensuring that the QA procedures are adhered to and that the process is implemented and revised as appropriate.

14.3 Fund management

Ricardo are responsible for the financial administration process working closely with the Scottish Government's finance team. In order to ensure all aspects of the financial management process will have a 'triple check' process. This means that before money can be drawn down each month into the independent bank account the funds will be requested by the grant manager, checked by the finance manager and approved by the service manager.

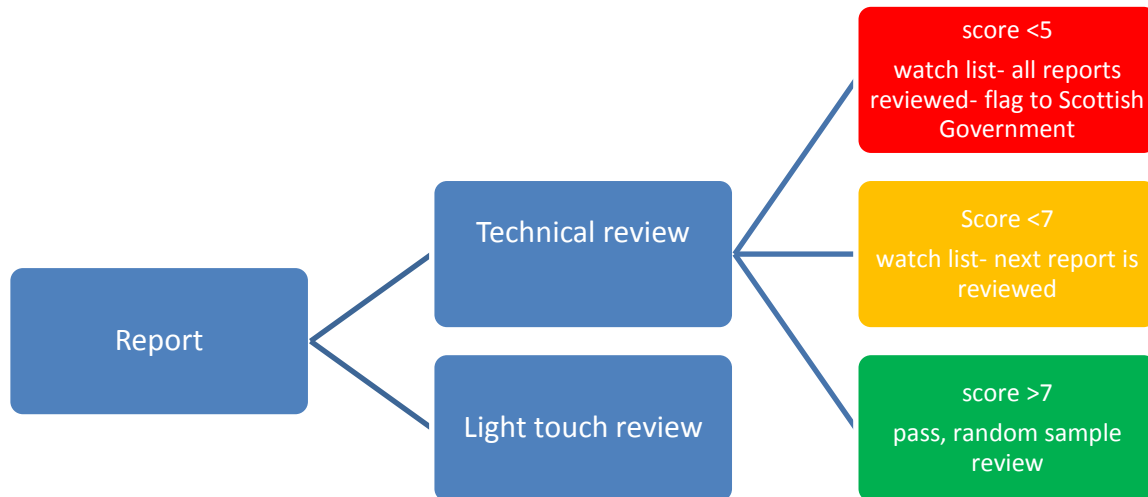
A monthly reconciliation will be conducted by the finance manager and the grant manager cross checking payments against the records in the CRM. This cross-checking will be conducted on a sample of payments to ensure that 1) the payment was approved for payment 1) the necessary approvals were in place from Ricardo's finance manager, 2) the report was issued to the farmer/crofter and successfully

passed the QA process, and 3) the required evidence was in place to authorise payment i.e. the invoice from the advisor to the farmer/crofter was correct and saved to the CRM.

The grant manager will report to the service manager any non-compliances which will either be logged in the QA report or in the case of a serious non-compliance will contact the Scottish Government immediately.

14.4 ILMP Quality Assurance Process

A two-tiered QA process will be adopted involving both a 'light-touch' review operating alongside a 'technical' review which will incorporate a scored 'traffic-light' system.



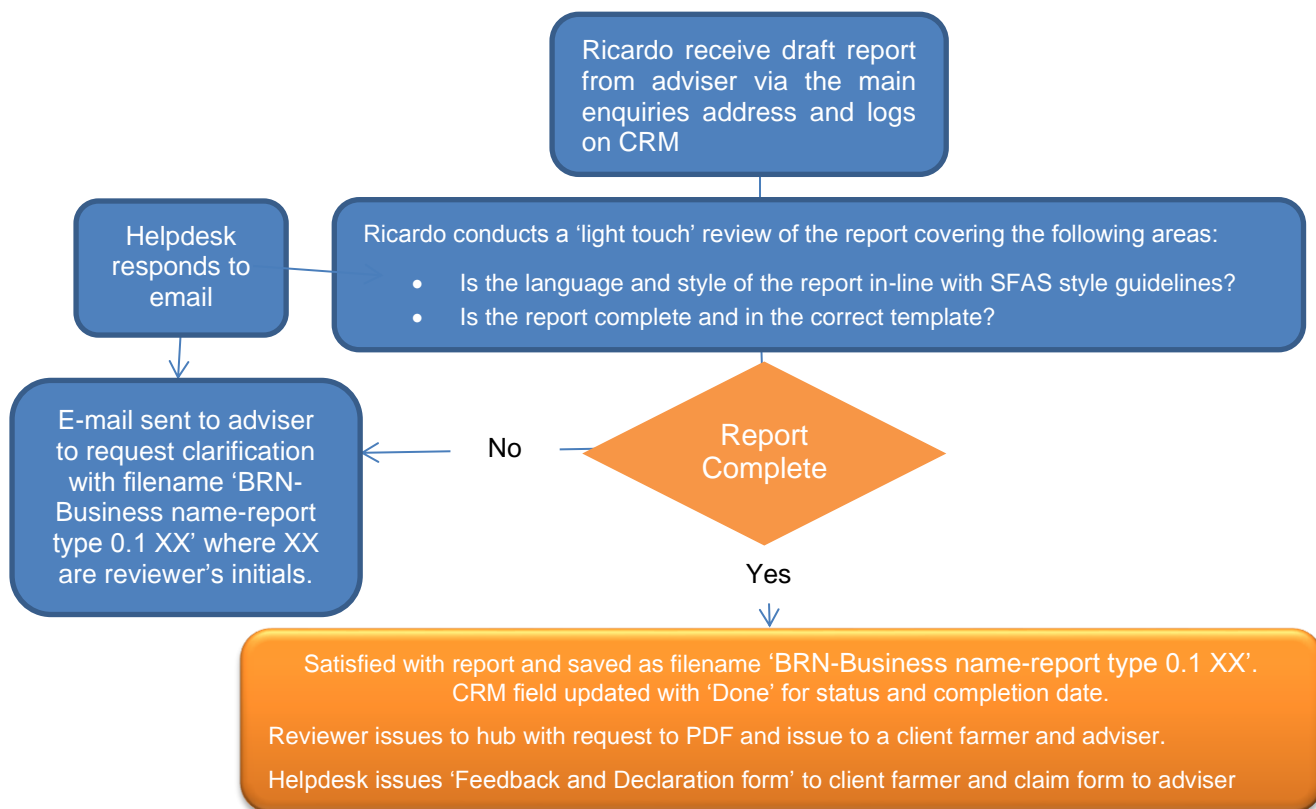
14.4.1 Light-touch QA process

Once received into the Hub via the advice@fas.scot address the Helpdesk team will log the report. Ricardo will then conduct a 'light-touch' review of the report as detailed in the diagram below and covering the following aspects:

- The correct template has been used and is complete;
- The clarity of presentation;
- Typographic errors; and
- Clarity in terms of grammar and language.

Once complete, the report will be saved to the CRM. Ricardo will send a pdf of the final report to the farmer and adviser simultaneously. The farmers will also be issued a 'Feedback and Declaration Form' and the adviser a claim form. The CRM will be used to track the time to conduct the 'light-touch' review and to ensure the time to review reports is kept to a minimum.

A flow diagram depicting the light-touch QA process is provided below.



14.4.2 Technical Review

Once received from the adviser, via the advice@fas.scot address, the Ricardo team will log the report onto the CRM. The first report from each adviser will be subject to an in-depth assessment. Following the first report, further reports will be either assessed at random or if the light touch reviewer raises concerns.

The 'technical accreditation' review will be much more detailed and will involve a 'deep-dive' into the quality of the technical advice as well as the 'softer' aspects of clear report writing.

The assessment will cover:

- Formatting, punctuation & grammar
- Readability
- Meeting the guidance; and
- Technical content and the extent to which a compelling case is made for adoption of the actions within the Plan.

Table 1 Guidance for Technical Review of reports (assessors' scoring).

Description	Technical Score	Description
Report clearly lays out how scope has been met	10	Technical advice provided appears to fully meets client requirements
Report meets scope but not fully described in report	9	Technical advice provided appears to substantially meets client requirements

Report meets scope but only partially described in report	8	Minor omission in terms of technical advice
Report doesn't cover one minor element of the scope	7	Significant omission in terms of technical advice
Report doesn't cover or describe why one significant element of scope wasn't covered	6	Major omission in terms of technical advice
Significant omission in terms of scope (e.g. primary focus of report not covered)	5	Wrong technical advice in one part of the report
Major omission in terms of scope (e.g. primary and secondary focus of report not covered)	4	Wrong advice throughout the report
Substantial omissions in terms of scope (i.e. majority not covered)	3	Serious technical errors in most of the report
Serious omissions in terms of scope (i.e. failure to address nearly everything)	2	Serious technical errors in all areas of the report
Nothing in report matches scope (i.e. none of the requested support provided)	1	Insufficient technical information in to allow any assessment (report generic not tailored to the client)

Peer reviewers are selected by Lantra. Peer reviewers are senior advisers who have been approved by Scottish Government to act in this capacity

All reports are logged onto the CRM and added to the QA tracking database.

- Issues captured on a log will be used to help identify any quality or guidance issues – these will be shared as part of the consultation and needs analysis process that will inform future adviser training.

14.4.3 Quality Assurance

A record of which reports have been checked and any issues identified will be kept on the QA tracker database.

The peer reviewers will send comments to Lantra who in turn will send Ricardo a comprehensive report (see appendix 1) within 10 days of receipt. Ricardo who will forward to the Adviser. The Quality Manager will update the tracking sheet accordingly. The adviser will then have two weeks to update the reports and re-submit them to Ricardo. An explanation of the significant issues must be recorded, and corrective actions agreed by both parties, and recorded.

If the score from the accreditation process is above 7 then the adviser will be able to continue to deliver ILMPs with only light touch review. If the first report scored less than 7, feedback will be shared on why the report was not of a high enough standard. The next report by the adviser will automatically be added to the accreditation review process. If this report achieves the required benchmark, then the adviser will be removed from the watch list. If not, then the adviser will be placed on a watch list where all future reports will receive a technical review. If their reports are consistently below standard and in agreement with the Scottish Government, then the adviser will not receive accreditation the following year and will be removed from the list of accredited advisers and will no longer be able to conduct the ILMP reviews.

14.4.4 Service level agreements

- Initial quality assurance of reports - light touch – 3 working days
- Technical review – 10 working days

14.5 Complaints Process

The complaints process is detailed in the rules and procedure document sent with every offer letter.

The service manager (Caroline Wood) will be informed of all complaints and will log details of the action taken and lessons learnt on a complaint register. Following each complaint, Caroline and Becci Barrett will review whether there is a need to provide further training or to modify procedures. We do not expect complaints and each complaint will be taken very seriously. If a complaint concerns an FBAASS registered advisor, we will discuss the matter with Lantra seeking the earliest possible resolution. Should a complaint be substantive Caroline will immediately inform Jack Dalziel (Scottish Government) and will discuss Ricardo's proposed resolution. In the case of a severe misdemeanour this may involve removing an adviser's accreditation. Such a step would never be taken without the agreement of Scottish Government.

15 Managing Adviser Payments

1 Approach to managing flow-through funds

Ricardo have extensive experience of managing grant programmes and handling government funds and operate a variety of models depending on customer requirements. Ricardo will administer the payments directly to recipients on the Scottish Government's behalf. To ensure Ricardo is 'acting on behalf of' the Scottish Government who are awarding the grant, Ricardo operate a separate bank account with funds being drawn down into the dedicated bank account in accordance with financial profiling and follow the procedures outlined below.

We have developed this process to ensure the following:

- No monies are awarded without evidence of the work being completed or support being provided (evidence saved onto the CRM)
- All monies to be paid in arrears
- The monies are ring-fenced and separated from Ricardo's own accounts

9.1.1 Overview of the Financial Management Process

We have established a ring-fenced client bank account at Lloyds Bank in the or the Service's name to facilitate the flow of funds directly to advisors from the Scottish Government.

This programme account is discrete from the operational bank accounts of the Ricardo business and the funds that pass through the account will not be accounted or reported as company turnover. The bank account is under the control of a financial manager with payments authorised using established and agreed procedures that include dual consents to release payments by electronic transfer. Interest accumulated on this bank account is the property of the Scottish Government and will be repaid upon request or closure of the bank account.

The service manager is responsible for ensuring the following process is adhered to.

- Only authorise a payment to an advisor once we have received and quality assured both the:
- visit report and
- signed feedback and declaration form.

The Finance Manager's role is critical to providing an additional layer of review and oversight to ensure that the process is followed, and any anomalies are identified and investigated.

Control and tracking of each transaction is managed through our CRM system. This in turn has a direct link with our Agresso accounting system. All requests for funding from the Scottish Government are based on a draft **funding schedule** from the CRM system for transactions where the above criteria are

met. No requests for funding will be made without review and approval of the Finance Manager and Service Manager.

9.1.2 Batch Funding

All claims that meet the above criteria will be batched into the draft funding schedule. A monthly reconciliation will be conducted by the Finance Manager and the Service Manager cross checking payments against the records in the CRM (visit reports, evaluation forms etc). This cross-checking will be conducted on a sample of payments to ensure that 1) the payment should have been made (reports issued and passed QA), 2) the required evidence was in place to authorise payment.

The funding schedule runs on an established 4 weekly cycle. Once approval is received the funding schedule is deemed final and is automatically uploaded onto the Agresso system for payment. When the agreed funding is received from the Scottish Government, the subsequent payments to the advisors are initiated via a BACS payment.

Electronic copies of programme bank account statements can be provided at such intervals as Scottish Government requires or on request by e-mail. The programme account will be subject to audit by our internal and external auditors, and subject to any audit Scottish Government might wish to undertake.

The accounting system used by Ricardo (Agresso) is a top-tier, global accounting system well recognised within industry, specifically designed to handle large project and programme management funds. Agresso is compliant with the requirements of the National Audit Office, HMRC and the London Stock Exchange in the UK and the control of projects and transactions required by European funding.

This process has been developed and honed over many years with disbursements of public funds through this mechanism approaching £100 million paid out in a single year at the peak of activity. Our management of such bank accounts and funds has passed all scrutiny and audits by the funding Departments and the National Audit Office.

Whilst this process is our suggested approach other models are available. The outcome of this process is:

- A dedicated programme account administered on behalf of the Scottish Government
- Robust double and triple-checks ensuring accurate payments of transparency
- A simplified approach for the Scottish Government only requiring one monthly payment

However, this process does limit our ability to make ad hoc payments to advisors or to expedite the process by making payment runs bi-weekly to reduce the time an advisor (predominantly a small business) has to wait to be paid. This could be nearly 8 weeks if the advisor sends an invoice just after the previous funding schedule has been raised.

16 Monitoring and Evaluation

Feedback from customers will be collected after the delivery of each advice activity via the 'Feedback and Declaration Form'. No advice visit will be closed out for payment until this form is received. Through review of this data we will seek to understand the perceived value of advice and measures farmer/crofter intends to implement. This data will provide valuable insight into where improvements can be made to the service or internal processes, which we will seek to implement to continually improve and enhance our delivery.

Ricardo will formally report on the feedback from each of the four grant schemes on an annual basis. This will include providing a full analytical report of the feedback received but also analytics to identify who is using the service and how they are accessing the advice to help inform future delivery. Whilst formal reporting is conducted on an annual basis, Ricardo will continue to extract data for Scottish Government on an ad hoc basis to respond to queries or help inform policy decisions.



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